

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Atty

Fifth Amended Account and Report of Conservator and Petition for its Settlement

Age	e: 81 years		DORIS BECKET	Γ,	NEEDS/PROBLEMS/COMMENTS:
DO	DOB: 1/12/1931		spouse/Conservator	, is petitioner.	
			Account period: 11/13/07 – 9/30/11		Examiner is unable to review these pleadings. The pleadings have incomplete sentences and paragraphs and do not make sense.
Coi	nt. from		Accounting Beginning POH	\$129,262.22 \$ 22,004.96	Accounting is not verified or signed by the
	Aff.Sub.Wit.		Ending POH \$ 5,770.60		Conservator. Probate Code §1020. Note: the
	Verified	Χ		,	accounting is signed by the attorney. It has not been verified. An attorney cannot verify for a
	Inventory		Current bond \$24,	500.00	fiduciary therefore the accounting must be
	PTC		G		verified by the Conservator.
	Not.Cred.		Conservator -	not addressed	Notice of the Hearing has not been given
	Notice of		Attorney -	not addressed	Notice of the Hearing has not been given.
	Hrg		7 tttorne y	not addressed	
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
	9202				
	Order				
	Aff. Posting				Reviewed by: KT
	Status Rpt				Reviewed on: 3/2/12
	UCCJEA				Updates:
	Citation				Recommendation:
	FTB Notice				File 1 – Beckett

3 The Anderson Family Living Trust

Atty

Case No. 09CEPR01013

Atty Keeler, William (for Donna Hanneman – Trustee)

Martinez, Vincent T. (for David Anderson, John Anderson, and Joy Jackman -Petitioners)

Petition for Distribution of Trust Income and Principal; Memorandum of Points and Authorities in Support Thereof

Age:		DAVID ANDERSON, JOHN D. ANDERSON, AND	NEEDS/PROBLEMS/COMMEN
DOD:		JOY ANDERSON JACKMAN, beneficiaries, are	TS:
		Petitioners.	
		Potitionous no sweet a Count and an	1. Petition is not verified by
Cont. from		Petitioners request a Court order: 1) instructing Trustee Donna Hanneman ("Trustee") to	Petitioners.
	<u> </u>	distribute trust income and principal of the Exemption	2. Need Order.
Aff.Sub.Wit.		Trust pursuant to the terms of the Anderson Family Living	
Verified	Х	Trust dated 11/23/92 ("Family Trust") and	
Inventory		<u>2)</u> removing Trustee as the Trustee of the Exemption Trust	
PTC		and appointed Petitioner Joy Anderson Jackman as	
Not.Cred.		Successor Trustee of the Exemption Trust, pursuant to the	
√ Notice of		terms of the Family Trust.	
Hrg		I. Petitioners' Request for Order to Instruct	
√ Aff.Mail	w/o	Trustee to Distribute Exemption Trust Income	
Aff.Pub.		and Principal	
Sp.Ntc.		Petitioners state:	
Pers.Serv.		1. They are 3 of the 6 Family Trust beneficiaries (<i>Copies</i>	
Conf. Screen		of the Family Trust and Amendments 1-4 are attached	
Letters		to Petition);	
Duties/Supp		2. Trust John Anderson died 12/15/95, at which time the	
Objections		Family Trust was split into the Marital Trust and the	
Video		Exemption Trust;	
Receipt		3. Surviving Settlor Edna Anderson made several amendments to the Marital Trust during her lifetime,	
		and she died on 7/19/09;	
CI Report		4. Petitioners have made several requests to the Trustee to	
9202	<u> </u>	distribute the Trust income and principal according to	
Order	Х	the Family Trust, however, Trustee has failed to	
Aff. Posting		distribute said income; The correspond the Expression Trust at the time of	Reviewed by: NRN
Status Rpt		5. The corpus of the Exemption Trust, at the time of Edna's death, consisted of mutual funds, commercial	Reviewed on: 3/2/12
UCCJEA		real estate and a promissory note, as well as a checking	Updates:
Citation		account held at Wells Fargo Bank;	Recommendation:
FTB Notice		6. Petitioners therefore request the Court order Trustee to	File 3 - Anderson
		comply with the terms of the Family Trust and	
		distribute the Exemption Trust income to its	
		beneficiaries.	
		SEE ATTACHED PAGE	
	1		

II. Petitioners' Request for Removal of Trustee and Appointment of Petitioner Joy Jackman as Successor Trustee

Petitioners state:

- 1. Trustors John and Edna ("Trustors") appointed 3 separate individuals as successor trustees of the Family Trust in the event of Trustors' deaths;
- 2. Trustors did not appoint Donna Hanneman as a successor trustee of the Exemption Trust;
- 3. After John's death in 1995, Edna made changes to the Marital Trust and appointed Donna Hanneman as Successor Trustee of the Marital Trust;
- 4. Since Edna's death in 2009, Donna Hanneman has been acting as the Successor Trustee of both the Marital and Exemption Trust;
- 5. Trustee submitted an accounting of the Exemption Trust for the period of 7/19/09 through 4/30/11; Schedule D of that accounting shows no income or principle distributions to the Exemption Trust beneficiaries in over two years;
- 6. Per the Family Trust terms, Kaye Cooper was to have been appointed as first successor trustee of the Exemption Trust:
- 7. Kaye Cooper passed away on 10/26/09;
- 8. Therefore, Richard Cooper should have been appointed, pursuant to the Family Trust; if Richard Cooper was unable or unwilling to act, then Petitioner Joy Anderson Jackman should have been appointed;
- 9. Instead, Donna Hanneman has been acting as the Successor Trustee since 2009; this is erroneous as she was not originally appointed as such by the Trustors'
- 10. Therefore, Trustee Hanneman should be removed as Trustee of the Exemption Trust and either Richard Cooper or Petitioner Joy Anderson Jackman appointed (<u>note: the prayer specifically requests that Joy Anderson Jackman be appointed</u>).

4 Lora S. Wilson (Estate)

Case No. 11CEPR00315

Atty Boyajian, Thomas M. (for Sally Kathleen Ellis – Daughter – Administrator)

(1) Petition for Final Settlement and Final Distribution, Waiver of Account, Waiver o Statutory Fees for Administrator, and (2) for Allowance of Fees for Attorney (Prob. C. 11600, 10800, 10810, 10831, 10951, 10954)

DOD: 12-2-10			SALLY KATHLEEN ELLIS, Daughter and	NEEDS/PROBLEMS/COMMENTS:
			Administrator with Full IAEA without	
			bond, is Petitioner.	1. Need order.
			Accounting is waived.	
	Aff.Sub.Wit.		18 A. ¢425 000 00	
~	Verified		I&A: \$125,000.00 POH: \$125,000.00 (real property only)	
>	Inventory		POH. \$125,000.00 (real property only)	
>	PTC		Administrator (Statutory): Waived	
>	Not.Cred.		, , , , ,	
N/A	Notice of		Attorney: \$3,500.00 (Less than statutory)	
21/2	Hrg			
N/A	Aff.Mail		Distribution pursuant to intestate	
	Aff.Pub.		succession:	
	Sp.Ntc.		Cally Kathlana Ellin Entire actata	
	Pers.Serv.		Sally Kathleen Ellis: Entire estate	
	Conf. Screen		consisting of real property only	
>	Letters	5-17-11		
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
>	9202			
	Order	Х		
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 3-2-12
	UCCJEA			Updates:
	Citation			Recommendation:
~	FTB Notice			File 4 - Wilson

5 Levon Goode (Estate)

Atty

Case No. 11CEPR00426

Tomassian, Gerald M. (for Marianne Goode and Joyce L. Serpa – Co-Executors)

(1) Waiver of Accounting and (2) Petition for Final Distribution Under Will and for (3 Allowance of Statutory Attorney's Fees (Prob. C. 11640, 10810)

DOI	D: 4-5-11		MARIANNE GOODE and JOYCE L. SERPA,	NEEDS/PROBLEMS/COMMENTS:
			Daughters and Co-Executors with Full IAEA	
			without bond, are Petitioners.	
			Accounting is waived.	
	Aff.Sub.Wit.		I&A: \$148,316.59	
>	Verified		POH: \$148,426.78	
>	Inventory		1 011. \$140,420.76	
>	PTC		Co-Executors (Statutory): Waived	
>	Not.Cred.			
\	Notice of		Attorney (Statutory): \$5,449.50	
	Hrg			
>	Aff.Mail	W/O	Closing: \$500.00	
	Aff.Pub.			
	Sp.Ntc.		Distribution pursuant to Decedent's will:	
	Pers.Serv.			
	Conf. Screen		Marianne Goode and Joyce L. Serpa as	
>	Letters	6-28-11	Successor Trustees of the Levon Goode	
	Duties/Supp		Revocable Living Trust Agreement dated 9-9- 10: \$142,477.28	
	Objections		10. \$142,477.26	
	Video			
	Receipt			
	CI Report			
>	9202			
>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 3-2-12
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
>	FTB Notice			File 5 – Goode

6 Helen Katherine Costa (Estate)

Case No. 11CEPR00537

Atty Willet, James A. (for Susan M. Fleming – Executor – Petitioner)

(1) First and Final Report of Executor on Waiver of Accounting and (2) Petition for Final Distribution of Estate and (3) for Order Authorizing and Directing Payment of Statutory Executor's Compensation and Statutory Attorneys' Compensation

and

Costs

DOD: 6-3-11			SUSAN M. FLEMING, Executor with Full	NE	EDS/PROBLEMS/COMMENTS:
			IAEA without bond, is Petitioner.		
			Accounting is waived.	1.	If the non-cash assets (securities, etc.) are to be distributed in undivided interests, need written agreement for
			I&A: \$824,519.34		such distribution pursuant to Local
	Aff.Sub.Wit.		POH: \$823,260.26 (cash and securities)		Rule 7.12.3.
~	Verified		POH. \$625,260.26 (cash and securities)		
>	Inventory		Executor (Statutory): \$18,927.36	2.	Need revised order pursuant to Local
>	PTC		Executor (Statutory): \$15,527.50		Rule 7.6.1.A. Monetary distributions must be stated in dollars.
~	Not.Cred.		Attorney (Statutory): \$18,927.36		must be stated in donars.
~	Notice of				
	Hrg		Costs: \$894.00 (filing, publication, certified		
~	Aff.Mail	W	letters, appraisal, etc.)		
	Aff.Pub.				
	Sp.Ntc.		Distribution pursuant to Decedent's will		
	Pers.Serv.		and codicils:		
	Conf. Screen				
~	Letters	8-	Equal shares to Susan M. Fleming,		
		4-	Mimi S. Rogers, and Stephen H. Schmid		
		11			
	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
~	9202				
~	Order				
	Aff. Posting				viewed by: skc
	Status Rpt			_	viewed on: 3-2-12
	UCCJEA			•	dates:
	Citation				commendation:
~	FTB Notice			File	e 6 - Costa

Sanoian, Joanne (for Petitioner Kimberly Bishoff)

Petition for Letters of Administration (Prob. C. 8002, 10450)

DOD: 11/23/11	KIMBERLY BISHOFF, daughter,	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit. Verified	is petitioner and requests appointment as Administrator without bond. All heirs waive bond.	1. #5a(7) or 5a(8) of the petition was not answered re: issue of predeceased child.
Inventory	Full IAEA – o.k.	
Not.Cred. Notice of	Decedent died intestate	Note to Judge: Based on the case number, the assigned probate referee should be Steven Diebert. The
Hrg √ Aff.Mail W/	Residence: Clovis Publication: Fresno Business Journal	inventory and appraisal has already been completed by Rick Smith and has been filed. The court may want
✓ Aff.Pub.		to consider appointing Rick Smith as
Sp.Ntc.	Estimated value of the estate:	the probate referee in this case since he has already appraised the property.
Pers.Serv.	Personal property - \$140,000.00	Examiner has left the information
Conf. Screen ✓ Letters	Income	about the probate referee blank in the order pending the courts
√ Duties/Supp	- \$ 00,000.00	determination regarding the referee.
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 3/2/12
UCCJEA		Updates:
Citation	1	Recommendation:
FTB Notice		File 10 - Bishoff

11

Atty

Sullivan, J. Patrick (for Petitioner Elizabeth Sosaya)

Spousal or Domestic Partner Property Petition (Prob. C. 13650)

DOD: 12/28/11			ELIZABETH SOSAYA, surviving	NEEDS/PROBLEMS/COMMENTS:
			spouse, is petitioner.	
			No other proceedings	
Coi	nt. from			
	Aff.Sub.Wit.		Will dated 12/25/11 devises entire	
✓	Verified		estate to spouse.	
	Inventory			
	PTC		Petitioner states she was married to	
	Not.Cred.		the Decedent for approximately 25	
√	Notice of		years. At no time during the	
	Hrg		marriage did the Decedent inherit	
✓	Aff.Mail	W/O	nor was he gifted any property. The	
	Aff.Pub.		two parcels of real property which is	
	Sp.Ntc.		the subject matter of this Petition	
	Pers.Serv.		were purchased by the parties during	
	Conf. Screen		the marriage using community	
	Letters		property funds.	
	Duties/Supp		TD 4*4*	
	Objections		Petitioner requests court	
_	Video		confirmation that Decedent's	
	Receipt		interest in two parcels of real	
	CI Report		property passes to her.	
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 3/2/12
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 11 - Sosaya

12

LeVan, Nancy J. (for Lorena Garcia – Daughter – Administrator) Emerzian, David L (for Omega Ochoa Garcia – Surviving Spouse)

Further Status Hearing

DOD: 2-7-07	LORENA GARCIA, Daughter is Administrator	NEEDS/PROBLEMS/COMMENTS:	
	with limited IAEA without bond.	Note: Examiner Notes from the 10-4-11 status	
		hearing with a brief chronology of this case	
	Letters issued 7-21-08.	are in the file for reference.	
Cont. from 120611			
Aff.Sub.Wit.	On 7-14-09, the Court approved a settlement	Need account or current status report.	
Verified	agreement between Administrator (daughter) and Omega Ochoa Garcia (surviving spouse)	Examiner notes that Letters issued	
Inventory	and allowed continuation of estate	over 3 years ago and the Court approved	
PTC	administration pending certain issues:	continuation of estate administration over 2 years ago.	
Not.Cred.	1) Retrial of the damages portion of Civil Case		
Notice of	# 04CECG03607 Garcia v. Roberts; and	At recent hearings, status was provided regarding the civil matter; however,	
Hrg	2) Receipt of proceeds due from an eminent	account current or status of this estate	
Aff.Mail	domain matter	is needed if the estate is not in a position	
Aff.Pub.		to be closed (Probate Code §12200).	
Sp.Ntc.	On 10-4-11 (the 7 th status hearing regarding	At hearing on 7-26-11, the Court was	
Pers.Serv.	retrial of the damages issue), Attorney	advised that the estate was awarded	
Conf. Screen	Emerzian advised the Court that a motion for	\$184,798.00, but a new trial may affect	
Letters	a new trial was denied and an appeal has	that award. The I&A value of the estate as of the date of death was \$5,125.00;	
Duties/Supp	been filed, and that deposits need to be	however, it is unknown if other amounts	
Objections	made. The Court set this hearing for further	have been recovered or received, etc.	
Video	status.	For example, at this point, what is the	
Receipt	Status Report filed 12-1-11 by Attorney	property on hand, and how is it held, etc.?	
CI Report	LeVan states that Attorney Ty Kharazi filed a	, , , ,	
9202	Notice of Appeal on behalf of his clients, the		
Order Aff. Posting	Roberts'. The Fifth District Court of Appeal has	Reviewed by: skc	
Status Rpt X	set a mediation for the parties on 12-12-11.	Reviewed by: Skc Reviewed on: 3-2-12	
UCCJEA V	Attorney LeVan requests to set a status	Updates:	
Citation	hearing in March 2012 to follow the progress	Recommendation:	
FTB Notice	of the appeal.	File 12 - Garcia	
	Minute Order 12-6-12: No appearances.		
	Matter continued to 3-13-12.		
	As of 3-2-12, nothing further has been filed.		

14 Atty

Merrill, Aja M. (pro per Petitioner/mother/Guardian)
2nd Account of Maddison Elizabeth Merrill

	Age: 5 years old		AJA MERRILL, guardian, is	NEEDS/PROBLEMS/COMMENTS:
DO	B: 6/21/2006		petitioner.	Continued from 1/17/12. Minute order states
				there are no appearances. The court continues the matter to 3/13/12 and orders Aja Merrill
			Account period: 9/1/09 – 10/31/11	to be present on 3/13/12. The Court further
				orders a copy of the examiner notes be sent to
Cor	nt. from 011712			the petitioner. Proof of service indicates the
	Aff.Sub.Wit.		Balance of the minor's blocked	minute order was mailed to Aja Merrill on 1/20/12. As of 3/2/12 the following issues
✓	Verified		account as Chase Bank as of	remain:
	Inventory		10/18/11 was \$19,711.13	1. This 2 nd Account was filed using a fee
	PTC			waiver. Accountings are considered to be
	Not.Cred.			costs of administration. There are assets
	Notice of	Х		in the guardianship estate to pay the filing fee.
	Hrg			2. Accounting does not comply with Probate
	Aff.Mail	Χ		Code \$1060.
	Aff.Pub.			3. Accounting is not on the mandatory
	Sp.Ntc.			Judicial Council forms. Probate Code §
	Pers.Serv.			2620.
	Conf. Screen			4. Petition was not signed by the Co-
	Letters			Guardian/father Samuel Merrill.
	Duties/Supp			5. Need Notice of Hearing.
	Objections			, o
	Video			6. Need proof of service of the <i>Notice of Hearing</i> on Maddison Merrill (minor)
	Receipt			pursuant to Probate Code §1460.
	CI Report			7. Need Order.
	9202			
	Order	Χ		De la cella 1/7
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 3/2/12
	UCCJEA Citation			Updates: Recommendation:
	FTB Notice			File 14 - Merrill
	11B Notice			THE 14-IMETHI

15 Angel Miramontes and Yareli Miramonte (GUARD/P) Case No. 12CEPR00048

Atty Corona, Maria (for Petitioner/maternal grandmother Maria Corona)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Δn	gel age: 8 years		Temporary Expires 3/13/2012	NEEDS/PROBLEMS/COMMENTS:	
DOB: 12/8/2003			Temporary Expires 3/13/2012	NEEDS/TROBLEMIS/COMMENTS.	
Yar	reli age 7 month B: 6/2/2011	ıs	MARIA CORONA, maternal grandmother, is petitioner.	1. Need Notice of Hearing. 2. Need proof of povernel corpies of the	
Coi	Cont. from		Angel's father: ANGEL MIRANDA – Yareli's father: LUIS FABIAN	2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence	
	Aff.Sub.Wit.		GUTIERREZ	on: a. Angel Miranda (Angel's father)	
✓	Verified			b. Luis Fabian Gutierrez (Aareli's	
	Inventory		Mother: YAIRA MIRAMONTES –	father)	
	PTC		consents and waives notice.		
	Not.Cred.		A 10 / 1 10 / 1	3. Need proof of service of the <i>Notice of</i>	
			Angel's paternal grandfather: Fernando	Hearing along with a copy of the petition or Consent and Waiver of	
	Notice of Hrg	Х	Miranda Angel's paternal grandmother: Liliana	Notice or Declaration of Due Diligence	
	Aff.Mail	Х	Miranda	on:	
	Aff.Pub.		Yareli's paternal grandfather: Luis Gutierrez	a. Fernando Miranda (Angel's	
	Sp.Ntc.		Yareli's paternal grandmother: Mrs.	paternal grandfather) b. Liliana Miranda (Angel's paternal	
	Pers.Serv.	Х	Gutierrez	grandmother)	
		^	Maternal grandfather: Hector Miramontes	c. Luis Gutierrez (Yareli's paternal	
✓	Conf. Screen		D 444 1/0/2010 1	grandfather)	
✓	Letters		Petitioner states on 1/8/2012 the mother	d. Mrs. Gutierrez (Yareli's paternal	
1	Duties/Supp		was arrested for hitting her oldest child Angel. CPS place a safety plan where	grandmother) e. Hector Miramontes (maternal	
\			Petitioner was to continue caring for the	grandfather)	
	Objections		children and was to keep the mother away	,	
	Video		from the home where the children were		
_	Receipt		residing. Petitioner is fearful that once		
✓	CI Report		released the mother will come and pick up		
	9202		the children. Petitioner is also concerned		
√	Order		that the fathers will come and pick up the children. Angel's father has a history of		
	Aff. Posting		spousal abuse and Yareli's father is an	Reviewed by: KT	
	Status Rpt		alcoholic and abuses drugs.	Reviewed on: 3/2/12	
1	UCCJEA			Updates:	
_	V		Court Investigator Dina Calvillo's Report	•	
	Citation		filed on 2/24/12.	Recommendation:	
<u> </u>	FTB Notice			File 15 - Miramontes	

Martinez, Yrene (pro per Petitioner/maternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		Petition for Appointment of Guardian of t	, ,
Age: 3 years		THERE IS NO TEMPORARY.	NEEDS/PROBLEMS/COMMENTS:
DOB: 9/8/2008		No temporary was requested.	
		YRENE MARTINEZ, maternal grandmother, is petitioner.	1. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence
Cont. from			on:
Aff.Sub.Wit.		Father: JOSE JESUS MEDINA	a. Jose Jesus Medina (father)
✓ Verified		Mother: ROSARIO IRENE	
Inventory		MEDINA – consents and waives	
PTC		notice.	Court Investigator Samantha Henson to
Not.Cred.		nonce.	provide:
✓ Notice of Hrg		Paternal grandfather: Jose Jesus Medina – <i>served on 1/31/12</i> .	1. Court Investigator's Report
✓ Aff.Mail	W/	Paternal grandmother: Selena	2. Clearances
Aff.Pub.		Creeapaum – <i>served on 1/31/12</i> .	
Sp.Ntc.		Maternal grandfather: Jesus Reyes –	
Pers.Serv.		Declaration of Due Diligence.	
✓ Conf. Screen		, c	
✓ Letters		Petitioner states mother has cancer and has days to live. Father is	
✓ Duties/Supp		incarcerated in Mississippi.	
Objections		Petitioner has been a part of the	
Video		minor's life since birth.	
Receipt			
CI Report	Х		
9202			
✓ Order			
Aff. Posting			Reviewed by: KT
Status Rpt			Reviewed on: 3/2/12
✓ UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 16 - Medina